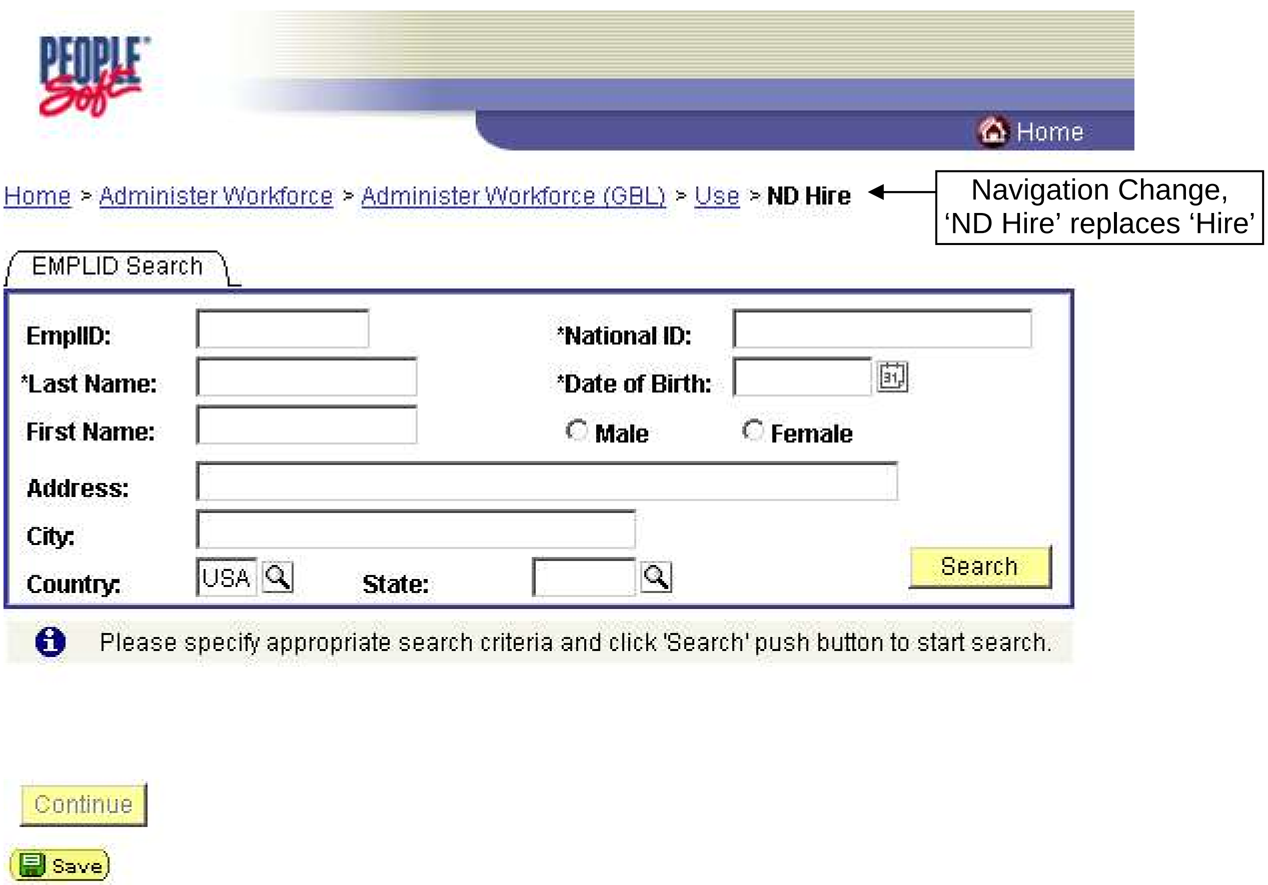
PeopleSoft
New Hire Checklists
HR/Payroll/Benefits

Revised October 18, 2005

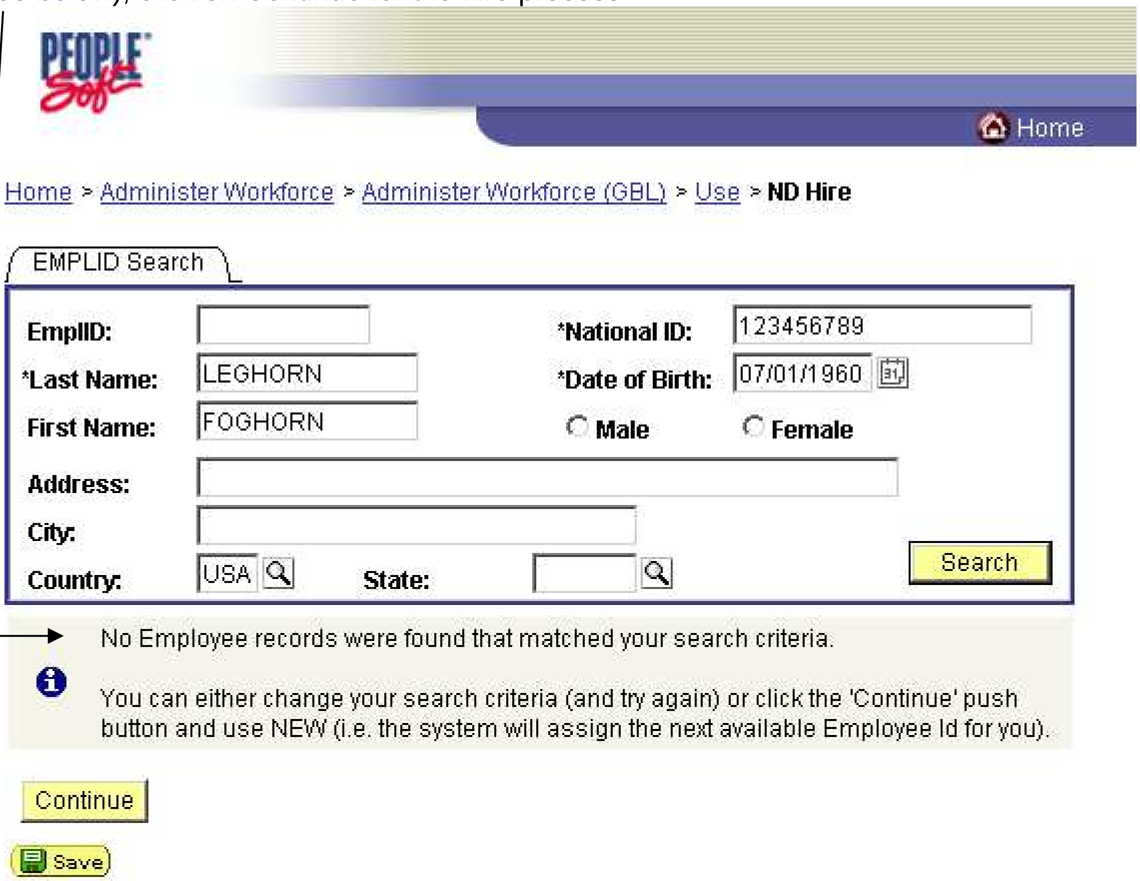
A business process change has been adopted in the ConnectND Hire process. The change is necessary to ensure that the HR and Student Administration databases are synchronized to avoid multiple ID's for any one individual. This is an important issue to enable the University System to track and administer the students they employ in work-study or as temporaries (and employees who take classes as students). Common ID's between the HR & Student databases will also help the University System do some tracking of students into the workforce and improve our knowledge of the educational backgrounds of our employees.

BUSINESS PROCESS CHANGE

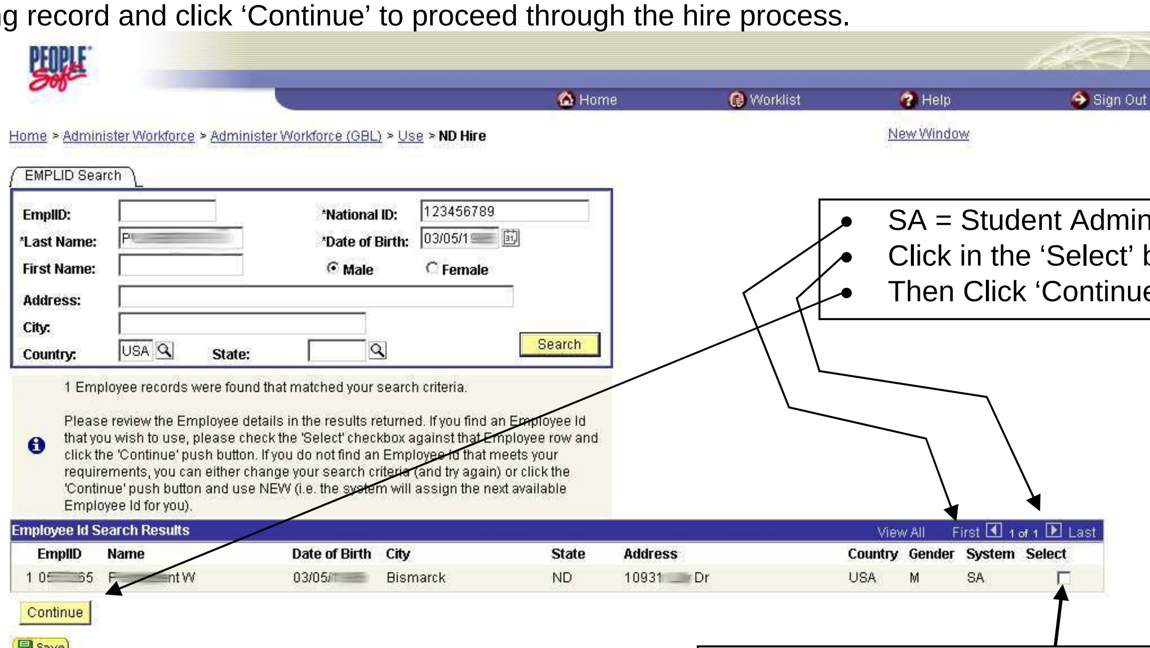
The business process change places a new entry screen in the hire process. On the employment side, the screen (shown below) uses various personal information on a new hire to search the Student Administration database to see if that person already has a StudentID. If it finds a record, the StudentID will become the EmplID.



Enter information for the new employee in the 'ND Hire' screen, then press 'Search'. If no records are found (see below), click on Continue for the hire process.



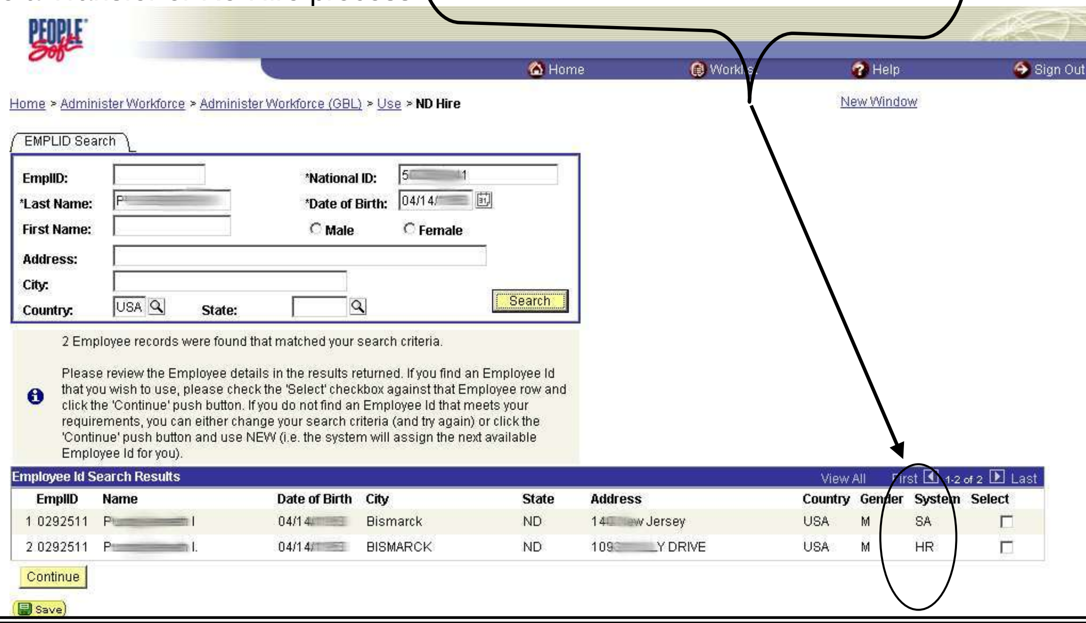
If a matching record is found in the Student Admin (SA) system, you may then select the correct matching record and click 'Continue' to proceed through the hire process.



- SA = Student Admin System
- Click in the 'Select' box
- Then Click 'Continue' to hire

Be sure to click in the 'Select' box to carry the ID forward to become the EmplID.

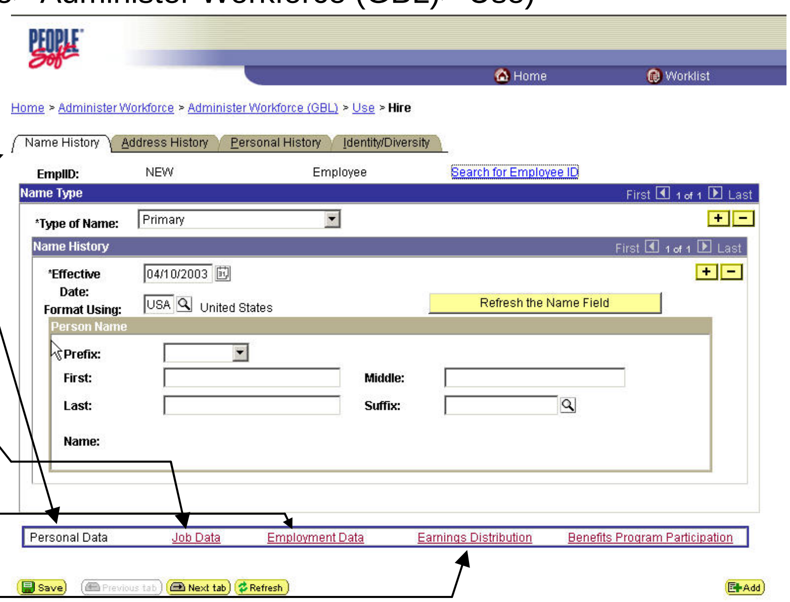
Finally, if a matching record is found in the HR database (or both HR & SA as below), it will be necessary to switch to a Transfer or Re-Hire process.



The following checklist highlights remaining Menu Items, Components, and Pages necessary for basic initial processing. The checklist focuses on the most common general situations. For specific detail, see the relevant manual.

HR/Payroll Checklist for New Hires

HR: (Navigation: Administer Workforce> Administer Workforce (GBL)> Use)



Hire (all tabs except Job Labor)

- Personal Data
  - o Name History
  - o Address History
  - o Personal History
  - o Identity/Diversity
- Job Data
  - o Work Location
  - o Job Information
  - o *Job Labor **(Not Used)***
  - o Payroll
  - o Salary Plan
  - o Compensation
- Employment Data
  - o Employment Information
- Earnings Distribution
  - o Job Earnings Distribution

Workers Compensation
Emergency Contact
Driver's License Data (Optional)

Note: The Service Date in Employment Data should always be set to the first day of the month to increment and accrue leave properly.

Payroll: (Navigation: Compensate Employees> Maintain Payroll Data (US)> Use)

Direct Deposit (*If they choose this*) (*the 'Suppress DDP Advice Print' box should be checked if the employee has access to the Portal and self service*)

Employee Tax Distribution (*This panel is automatically created through 'hire' but should be checked for correct locality information***)**

Employee Tax Data (*For a new hire, insert a new row with the effective date of the day after the hire date even though the employee's tax status is S and allowances are 0 (the default) to signify that you have reviewed the employee's tax data***)**

- Federal Tax Data
- State Tax Data

General Deduction Data (*All employees must be enrolled in S00901-Section 125 admin fee***)**

Commitment Accounting: **(**Navigation: Home>Define Business Rules>Define Commit Accounting(US)>Setup>Department Budget Table)

Department Budget Table (*All employees must have a department budget table. If the hire is a permanent employee filling a previously existing position, the table may already be set up, but ensure the established account code(s) is correct for that employee.***)**

Benefit Program Checklist for New Hires

A business process change has also been adopted in the Benefit Enrollment process. You will no longer use the Base Benefits portion of Peoplesoft to enroll new hires in their benefits. Instead, the Benefits Administration (Ben Admin) process will be used. Keep in mind that Ben Admin processes events, not participants. This processing will facilitate consistency in benefit plan enrollment and make the enrollment process more streamlined. Following is a checklist for the processes you will follow in using Ben Admin. If you wish to have more detail than what is provided here, please refer to the Ben Admin manual. Sample event maintenance exercises are also included in the manual for your convenience.

After hire data has been entered on Job Data, the following must occur to enroll employees in the benefits they are eligible for. **The navigation for all Ben Admin actions is Home>Compensate Employees>Administer Automated Benefits.**

1. **Verify BAS activity**. Events are in emplid order and there should be an event class HIR for the individual you are verifying. Event Date should be Hire date.

2. **Events will be assigned to a schedule**. For the present time, NDPERS will run this activity. Scheduling will occur a minimum of three times a day, Monday through Friday.

3. **Verify schedule and program assignment**. Using either Event Status Update or Controls Processing Update, you will verify that the individual has an "assigned" status, that they are in the correct benefit program and that they are scheduled into your business unit. *The schedule assigned should be the first three numbers of the Business Unit number followed by EM. (Company ID followed by EM if you are a Campus.)*

4. **It is now necessary to prepare options for the individuals you are processing**. If this is your first time preparing options, you will need to add a Run Control ID. (See Manual for assistance if you need it) After the schedule ID is created, it can be reused and should be entered in the Schedule ID field. BAS type should always read "Process Existing Events Only". You will press Run button to take you to the Process Scheduler. Server Name selected should be "PSNT" and the "OK" should be selected to process. By pressing Process Monitor Review, you will be able to track the status of your processing. Don't forget to enter your schedule ID when running the processing! After your process finishes with "success", press go back to Run Control to return to the breadcrumbs.

5. **Next you will verify that the options have been prepared**. You may use either Event Status Update or Processing Controls Update to do so. The process status for your HIR event should now be Prepared (PR). Benefits can now be elected for each participant you are processing.

6. **You will want to produce an Enrollment Statement to facilitate your data entry of the employees benefit program elections**. This statement is only for your use as a data entry tool and should not be given to the employee. You will need to enter your run control id and your schedule id. Be sure to indicate that **Type = Web** and **Format = PDF.**

7. **Elect options.** After you have received the necessary completed paperwork back from the employee, transfer the employee's elections to the Enrollment statement. On Election Entry, enter all the benefits the employee has elected to participate in as well as enter all dependents. DO NOT ENTER BENEFICIARY INFORMATION, as that will be maintained at NDPERS. Defaults are located in the Appendix B of the training manual if you need to refer to that table. After elections are entered, be sure to hit "SAVE". Do this for each Hire you have. This activity will cause the Process Status to change to "Entered". (ET)

8. **Your next action will be to Finalize/Enroll employees in the benefits they have elected.** You will need to enter your Run Control ID and enter your schedule ID and tab out of that field. Always select "Process Existing Events". You will press the Run button to take you to the Process Scheduler. Server Name selected should be "PSNT" and the "OK" should be selected to process. By pressing Process Monitor Review, you will be able to track the status of your processing. Don't forget to enter your schedule ID when running the processing! After your process finishes with "success", press go back to Run Control to return to the breadcrumbs.

9. **Verify the finalized event.** Using either Event Status Update or Processing Controls Update, verify that the Process Status for your HIR event is Finalized/Enrolled (FE) and the event status is closed. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is. You may verify benefit enrollment for each plan type by accessing it in Base Benefits or through Benefits Summary (payroll dedns). The navigation is Home>Compensate Employees>Administer Base Benefits.

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